

COMMUNITY INVESTMENT PROCESS FISCAL YEAR 2020

- I. **United Way of Greater Portland invests in the community through supporting the Goal of Thrive2027.** We do this through:
 - a. Aligning our Community Impact Investments with Thrive2027 strategies;
 - b. Guiding individual giving groups that invest money their members contribute to Thrive2027 goals;
 - c. Seeking additional funds from philanthropic organizations, including corporations and foundations;
 - d. Supporting public and organizational policies that result in investment in outcomes that support Thrive2027;
 - e. Targeting volunteer efforts that connect to Thrive2027 strategies.

- II. **Eligibility**
 - a. As a United Way, we serve Greater Portland, which is Cumberland County minus Brunswick and Harpswell. Applicants must serve the community in these areas.
 - b. Organization must be a non-profit 501(c)(3) federal tax exempt organization, public school, municipal entity, Indian Tribal government or can demonstrate a legal relationship with an established 501(c)(3) acting as our fiscal agent.
 - c. The program must be doing work that demonstrates progress toward the Thrive2027 Goals.
 - d. We will review applications from every program that was funded last year that chooses to apply. This includes:
 - i. **Historically-funded partners** with funding amounts that follow the program. This is the last year this will be a category.
 1. Your funding with this application is protected up to 50% of what you were granted from FY19 funds, unless there is a significant program flaw or financial concern. This stipulation is not intended to indicate anything about how much funding you might be awarded. Those decisions will be made by the investment teams.
 2. You may choose to apply with the same program or with a program that you think is better positioned to make an impact on the Thrive2027 goals. You do not have to pick the same strategies as last year.
 - ii. **Newly funded programs in FY19**
 1. No guarantee or special restriction
 - iii. We will only review **new applications** in areas identified by the Thrive2027 goal Cabinets for each goal area.
 1. We will share this information as soon as we have it available. We will have another meeting on **December 17, 3:00 – 4:30 p.m. at MaineHealth** to be able to answer questions on these identified areas for new applications.
 - e. Restrictions
 - i. Programs must apply for at least \$10,000

III. Application Process

- a. Tentative open date is January 8 and tentative close date is February 26, 2019. We will communicate investment decisions in mid-June.
- b. The review of applications for 2020 funding will consider:
 - i. Specific impact on Thrive2027 goals;
 - 1. Alignment with identified Thrive2027 strategies
 - a. In response to the request that we look at how we use the framework and application to understand potential impact, programs can apply under more than one goal.
 - i. Programs will pick a primary goal.
 - ii. Limit of three strategies across all three goals.
 - 2. Proposed activities that support the success of the chosen strategy
 - 3. Target population that will result in impact on the identified goal
 - ii. Tracking and evaluation of program implementation
 - 1. Ability to measure and report impact of programs as How Much, How Well and Difference Made
 - iii. Solid management and fiscal soundness
 - 1. An organizational and program budget that allow for full implementation of the proposed work
 - 2. Sustainability of the organization or collaboration and the proposed program, including the role of UWGP funding in sustainability
- c. Staff support
 - i. We will set up a system for staff support in January. This will include the ability to make an appointment using an on-line tool to have an in-person or phone meeting with a member of the staff

IV. Thrive2027 Data

- a. Framework
 - i. Revisions by Goal Cabinets since last application cycle:
 - 1. All goals have reworded strategies for clarity and specificity of the intent of the group. Some strategies have been combined or eliminated. If a strategy was eliminated it has been rolled into another broader strategy.
 - 2. Goals 1 & 3 have new indicators that provide better tracking of the change we want to see.
- b. Data tracking
 - i. Shared performance measures
 - 1. We will require shared performance measures on a selection of the strategies. At the December 17 meeting we will be able to share and discuss these.